

Department of Mental Health
TRANSMITTAL LETTER

SUBJECT

Minimum Standards for Telephone-based Customer Service

POLICY NUMBER	DATE	TN#
DMH Policy 681.2A	OCT 06 2003	33

Purpose. The attached Mayor's Memorandum is being reissued to set forth the minimum standards for telephone-based customer service and to emphasize the importance of implementation and adherence.

Applicability. This policy applies to all Department staff at Mental Health Authority (MHA), Community Services Agency (CSA), and Saint Elizabeths Hospital (SEH).

Policy Clearance. Reviewed by affected responsible staff and cleared through appropriate MHA offices.

Implementation Plans. A plan of action to implement or adhere to a policy must be developed by designated responsible staff. If materials and/or training are required to implement the policy, these requirements must be part of the action plan. Specific staff should be designated to carry out the implementation and program managers are responsible to follow through to ensure compliance. Action plans and completion dates should be sent to the appropriate authority. Contracting Officer Technical Representatives (COTRs) must also ensure that contractors are informed of this policy if it is applicable or pertinent to their scope of work.

Policy Dissemination and Filing Instructions. Managers/supervisors of the DMH must ensure that staff are informed of this policy. Each staff person who maintains policy manuals must promptly file this policy in Volume I of the **DMH** Policy and Procedures Manual.

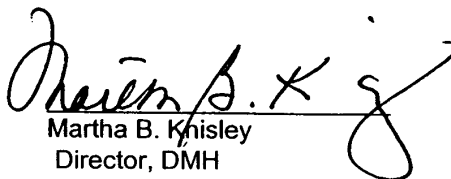
ACTION


REMOVE AND DESTROY

DMH Policy 681.2
dated May 9, 2002
(with the same title as above)

INSERT

DMH Policy 681.2A


Martha B. Khisley
Director, DMH

GOVERNMENT OF THE DISTRICT OF COLUMBIA  DEPARTMENT OF MENTAL HEALTH	Policy No. 681.2A	Date OCT 06 2003	Page 1
	Supersedes DMH Policy 681.2, dated May 9, 2002 (with same title)		

Subject: Minimum Standards for Telephone-based Customer Service

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2. **Applicability.** This policy applies to all Department staff at the Mental Health Authority (MHA), Community Services Agency (CSA), and Saint Elizabeths Hospital (SEH).

3. **Authority.** Mayor's Memorandum 2003-4, dated February 28, 2003 (Exhibit 1).

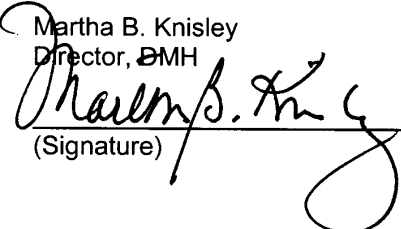
4. **Policy.** Consistent with the attached Mayor's memorandum, it is the policy of the Department of Mental Health to promote the highest level of customer service to each caller and for managers and supervisors at all levels to ensure that every aspect of the Mayor's memorandum is implemented and followed.

5. **Actions Required of all Managers.**

- (a) **Discuss** the attached Mayor's Memorandum with staff under their purview and with new employees when they are hired.
- (b) **Ensure** that outgoing voice mail messages are set up in accordance with the attached guidelines.
- (c) **Emphasize** to staff the importance of courtesy and professionalism when dealing with all customers at all times.
- (d) **Register** staff in appropriate training to achieve excellence in customer service as required.
- (e) **Develop** measures to evaluate the effectiveness of customer service.

6. **Implementation.** The required actions shall be implemented promptly. Actions listed in section 5(a)-5(c) shall be implemented within thirty (30) days from the date of this issuance.

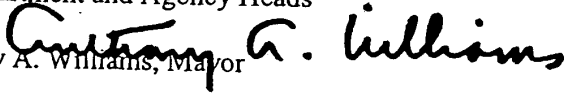
Approved by:

Martha B. Knisley
 Director, DMH

 (Signature) 10/6/03
 (Date)

ADMINISTRATIVE ISSUANCE SYSTEM

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Mayor's Memorandum 2003-4
February 28, 2003

TO: All Department and Agency Heads
ORIGINATOR: Anthony A. Williams, Mayor 
SUBJECT: Minimum Standards for Telephone-based Customer Service

In order to ensure that the District Government is providing the highest level of customer service to each caller, District agencies and offices shall implement the following minimum standards for telephone based customer service. The overarching goal is to ensure that main numbers and service numbers are staffed at all times during business hours to provide the highest level of customer service.

- I. **Definitions** – From a customer service perspective, telephone services are operationally defined in four categories: Main numbers, large service numbers, small service numbers and desk numbers.
 - A. **Main Numbers** – are entry points into the agency/department. Main numbers route calls throughout the organization. (e.g., Department of Health's main number is (202) 442-5999). This number should be staffed at all times during business hours.
 - B. **Large Service Numbers** – are published numbers that go directly to an Agency/Department's operational unit that provides a service (e.g., The Office of Fire Code Inspections within the Department of Fire and Emergency Medical Services). This service number should be staffed at all times during business hours.
 - C. **Small Service Numbers** – are numbers with a constituent volume that does not demand more than one dedicated full-time equivalent employee staffing the number. (e.g., Department of Public Works, Tree Trimming Services). This operation, albeit small, must be structured to provide the same level of high quality service as main and large service number operations. This service number should be staffed at all times during business hours.

Agencies/Departments have the option to collapse their small service operations into one service number so that it generates sufficient volume to require a full-time equivalent staff person manning the telephone number during business hours.

- D. **Desk Numbers** – are telephone numbers for Agency/Department employees. All employees should answer calls professionally and courteously. Desk voicemail should also reflect the same professionalism that would be provided during a direct conversation with a constituent.

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II. Voicemail/Outgoing Message – Every telephone equipped with voicemail should have a standard outgoing greeting that is professional, concise, and conveys relevant and useful information to the caller.

- A. Main number** – Based upon the requirement that all main numbers are staffed during business hours, the voicemail greeting for all main numbers should be an “afterhours” greeting. This greeting should convey the following information: Agency/Departmental Unit; Office Hours; options for caller (e.g., leave a message, web site address, fax number, information about critical services available after normal business hours); That caller will receive a return telephone call to verify receipt of the service request within 24 hours or within the next business day.
- B. Large Service Number** – should have an “afterhours” greeting. This greeting should convey the following information: What office the caller has reached; What number has the caller reached; What service is provided through this service number; What type of information the caller should leave on a message; and that the caller will receive a return telephone call to verify receipt of the service request within 24 hours or within the next business day.
- C. Small service numbers** – should have an “afterhours” greeting. This greeting should convey the following information: What office the caller has reached; What number has the caller reached; What service(s) are provided through this service number; What type of information the caller should leave on a message; and that the caller will receive a return telephone call to verify receipt of the service request within 24 hours or within the next business day.

Employees assigned to small service numbers are responsible for managing the operation at the highest level of customer service.

- D. Desk Telephone Standard Greetings** – should have the following information included within the greeting:
 - a. Name of the Employee
 - b. Title of the Employee
 - c. Organizational Unit of the Employee
 - d. What number to dial for immediate assistance or “0” for operator assistance
 - e. When calls will be returned – Within 24 hours or within the next business day

III. Receiving and Returning Telephone Calls

- A. Returning Telephone Calls:** Calls made to all numbers at every level of government should be returned within 24 hours or within 1 business day of receipt.

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B. Salutation: State name and agency and solicit information (e.g., "Thank you for calling agency X this is John Doe. Can I help you?"). At the end of the conversation, thank the person for calling.

C. Receiving a Transferred Call:

1. All DC employees are expected to take transferred calls from telephone call distribution points (e.g., Mayor's Call Center)
2. The employee should minimize the number of times a caller is transferred to resolve an issue by taking the message and distributing it to the appropriate staff person for resolution. The goal is one transfer per constituent and the transfer should be to another person, not voicemail. If the call is inappropriately transferred to you, take down the caller's information and have the appropriate individual return the telephone call.

D. Basic Knowledge:

1. All DC employees are expected to have a basic understanding of the primary functions of their agency.
2. The employee should have a basic knowledge of District services (e.g. 311, 911, 727-1000, Answers Please, web site address, and agency main numbers)

IV. Telephone etiquette – In addition to the requirements for salutation, transferring calls and possessing basic knowledge (listed in Section III B, C and D above), each telephone call should be handled with the highest level of customer service by all District employees:

- Answer calls within 3 rings
- Give customers options (e.g., hold, call back, leave a message, or try another number)
- Ask to put the caller on hold and wait for the response
- Check back with customer frequently when on hold
- Use judgment by handling callers as you would want your call to be handled
- Provide options for resolution
- Facilitate
- Speak as you would like to be spoken to

V. Courtesy – Each caller to a District agency should be treated with the highest level of customer service by all District employees:

- No speakerphones
- No food or gum while talking with constituent

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- No secondary conversations with individuals other than caller while caller is on the phone
- Convey sympathy, professional courtesy and a pleasant attitude
- Provide reference information when transferring calls
- Treat callers as you would want to be treated
- No rudeness
- Do not become confrontational

VI. Agency/Department heads are required to ensure compliance with these telephone customer service standards to improve the level of customer service within their agency.

VII. Mayor's Memorandum 2000-2, dated April 4, 2000, is hereby rescinded.